

COLLEGE *of*  
CHARLESTON

# eProcure User Manual

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# Introduction

eProcure is the College's electronic purchasing software. This software is used to generate purchase orders. Orders are created in a shopping cart and then submitted for approval and processing. Completed purchase orders are then sent to the vendor via email or fax.

eProcure has established work-flow steps based on various criteria. Common steps include Budget Authorization, Fund Approval, IT Buyer Review, Procurement Review, etc.

For eProcure to work efficiently the [Index/FOP Access Form](#) must be updated to reflect current staff and their allowed eProcure approval limits (if any). Out-dated or non-existent forms will delay the automated ordering/approving workflow.

All College employees have access to eProcure as a shopper by default. No additional action is needed if a user will only have shopper authority.

The Office of Procurement offers monthly hands-on training sessions. Tutorials are also available on our [website](#).

## Accessing eProcure

The College's eProcure system can be accessed through MyCharleston. First, log into MyCharleston (<https://my.cofc.edu>). From there, click on the eProcure shopping cart icon in the top navigation bar. Clicking on the eProcure icon will launch a new window.



## Common Problems Accessing eProcure

Users may occasionally experience the following problems accessing eProcure.

### Internet Browser

Mozilla Firefox, Internet Explorer and Google Chrome all support eProcure. Safari is not compatible.

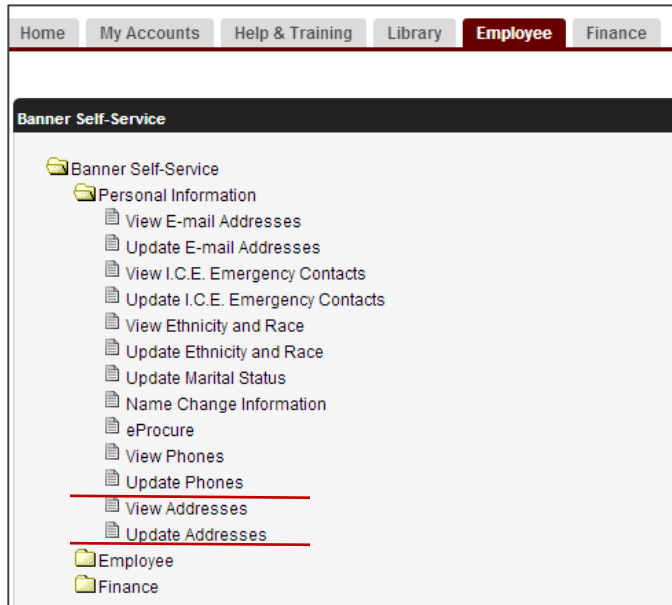
### Pop-Up Blockers

The most common problem accessing eProcure is that the internet browser is blocking pop-ups. There is usually an on-screen notification explaining that a window has been blocked. The settings to change this vary from browser to browser and are not hard to change. If a blank window or no pop-up window it can be forced to open if using a PC. To force the window to open, hold down the *ctrl* key on the keyboard and simultaneously hold down the eProcure icon. If the eProcure window opens, then the problem is the pop-up blocker settings on the internet browser.

## Update Contact Information

First time users experiencing difficulty accessing eProcure should verify that their College of Charleston address and business phone number is listed under the Employee Tab in Banner Self-Service.

If not, add the address and phone number, by going to MyCharleston, then the *Employee* tab, and finally to the Banner Self-Service folder (see below).



Click on the *Update Phones* link. The following page will open:

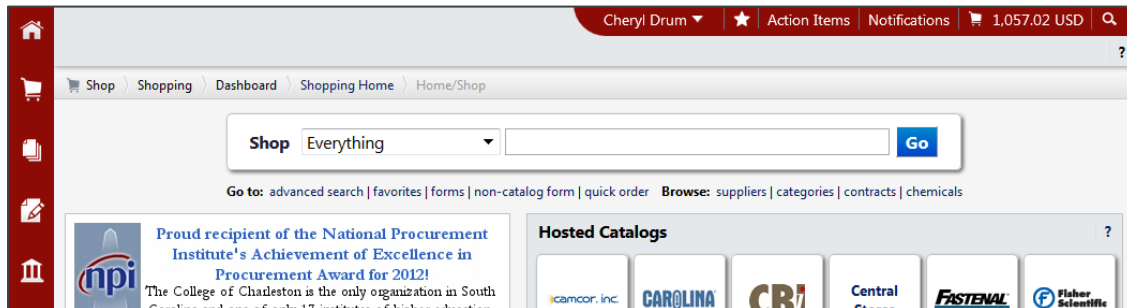
A screenshot of the 'Update Phones' page in the Banner Self-Service system. The page has a header with 'Personal Information', 'Employee', and 'Finance' tabs. Below the header is a search bar and a 'Go' button. The main content area is titled 'Update Phones' and contains instructions for selecting a phone to update or clicking the 'Insert a New Telephone Number Not Listed Above' button. There is also a section for 'CougarAlert' and instructions for students and employees. At the bottom, there is a list of existing phone numbers for the user, including 'CofC Office' and 'Cell Phone with text'. The 'Insert a New Telephone Number Not Listed Above' button is highlighted with a red box.

### Insert a New number.

Select "College of Charleston" from the drop-down menu, insert the number (no dashes) and click on the *Submit* button.

# Home/Shop Page

eProcure will open to the Home/Shop page.



Use the left navigation bar to navigate within eProcure. Also, at the top right-hand corner of the window are short-cuts to the user's profile, pending actions, notifications and active shopping cart.

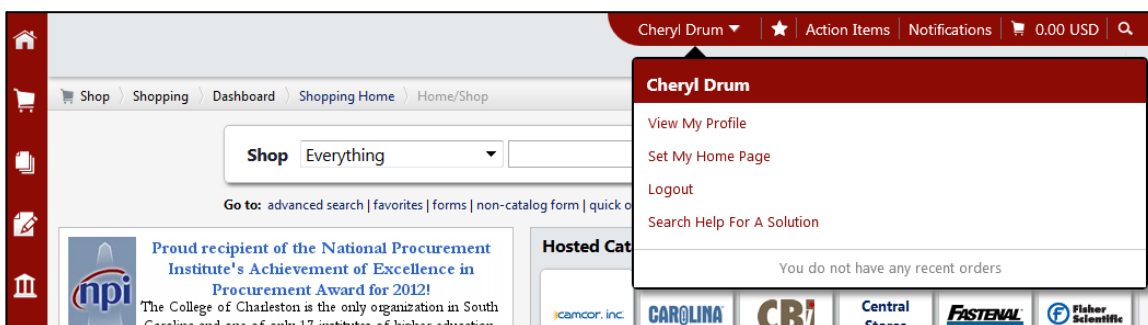
The user can also search for menu items using the Menu Search. The binoculars icon is located in the bottom left-hand corner of the Home/Shop page



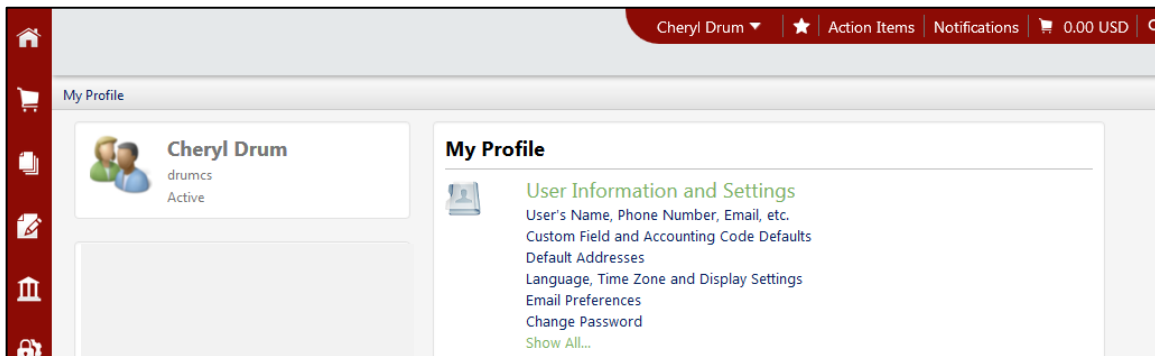
Please refer to the following sections for specific instructions on using and navigating eProcure

## User Profile Settings

All user settings can be accessed by clicking the user's name at the top-middle of the home page. Select *View My Profile* from the menu. Contact information from Banner Self-Service is automatically loaded into eProcure.



The following page will open. From this screen, various user settings can be set-up or changed.



Settings that can be changed are listed under the *User Information and Settings* section. Click on the *User's Name, Phone Number, Email, etc.* line to add/change the department and add/change the email approval code (only for those employee's with approval authority).

A screenshot of the 'User's Name, Phone Number, Email, etc.' settings page. The breadcrumb trail shows 'My Profile > User Information and Settings > User's Name, Phone Number, Email, etc.'. The left sidebar shows the 'User Information and Settings' section expanded, with 'User's Name, Phone Number, Email, etc.' selected. The main form contains the following fields: First Name (Cheryl), Last Name (Drum), Phone Number (1 843 9532756, +1 (843) 953-2756), E-mail Address (drumcs@cofc.edu, Email User), Department (Procurement (Procurement)), Position (dropdown), Badge Id, User Name (drumcs), a question and answer section (Question: What is the middle name of your oldest child?, Answer: \*\*\*\*, Confirm Answer: \*\*\*\*), Authentication Method (Local), and Email Approval Code (\*\*\*\*\*). A blue 'Save' button is at the bottom right.

Choose the department from the drop-down menu. See Approvals section for additional information on the Email Approval Code.

**Be sure to click the Save button when finished making changes!**

## Email Preferences

EProcure assigns default email preferences based upon a user's role within eProcure. To view default email settings or to change settings, click on the *Email Preferences* line within the *User Profile*. Several email and notifications are set by default. There are drop-down menus next to each option to select the user's preference.

The screenshot shows the 'Email Preferences' page for user Cheryl Drum. The left sidebar contains a menu with 'Email Preferences' selected. The main content area is titled 'Email Preferences' and includes a message: 'The in-application notifications are not yet available for all Email Preferences.' Below this, there are two sections: 'Administration & Integration' and 'Shopping, Carts & Requisitions'. Each section contains a list of notification types with corresponding drop-down menus, all currently set to 'None (Default)' or 'Email & Notification (Default)'.

Section	Notification Type	Default Preference
Administration & Integration	Prepared By - PO Distribution Failure Notice	None (Default)
	User Registration pending approval	None (Default)
	Search Result Export Confirmation	None (Default)
	PR Workflow Step error notice	None (Default)
	PR Export Failure Notification	None (Default)
	PO Workflow Step error notice	None (Default)
	PO Distribution Failure Notice	None (Default)
	PO Export failure notification	None (Default)
Daily customer feedback report	None (Default)	
Shopping, Carts & Requisitions	Prepared By - Cart Assigned Notice	None (Default)
	Prepared By - PR line item(s) rejected	None (Default)
	Prepared By - PR rejected/returned	None (Default)
	Cart Assigned Notice	Email & Notification (Default)
	Receive PR and PO notifications for Carts Assigned to Me	None (Default)
	Assigned Cart Processed Notification	None (Default)
	Assigned Cart Deleted Notification	None (Default)

Be sure to click the **Save** button when finished making changes!

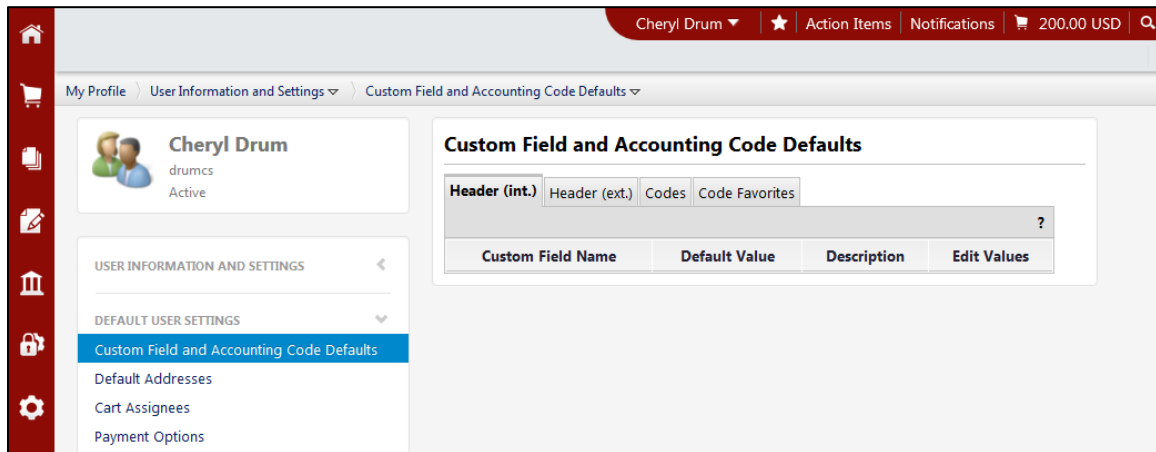
## Adding a Purchasing Card

PCard holders can add their card to their user profile by selecting the *Custom Field and Accounting Code Defaults* line from the menu.

The screenshot shows the 'My Profile' page for user Cheryl Drum. The left sidebar contains a menu with 'My Profile' selected. The main content area is titled 'My Profile' and includes a sub-section 'User Information and Settings'. A list of options is displayed, including 'User's Name, Phone Number, Email, etc.', 'Custom Field and Accounting Code Defaults', 'Default Addresses', 'Language, Time Zone and Display Settings', 'Email Preferences', and 'Change Password'. An arrow points from the 'Custom Field and Accounting Code Defaults' option to the right.

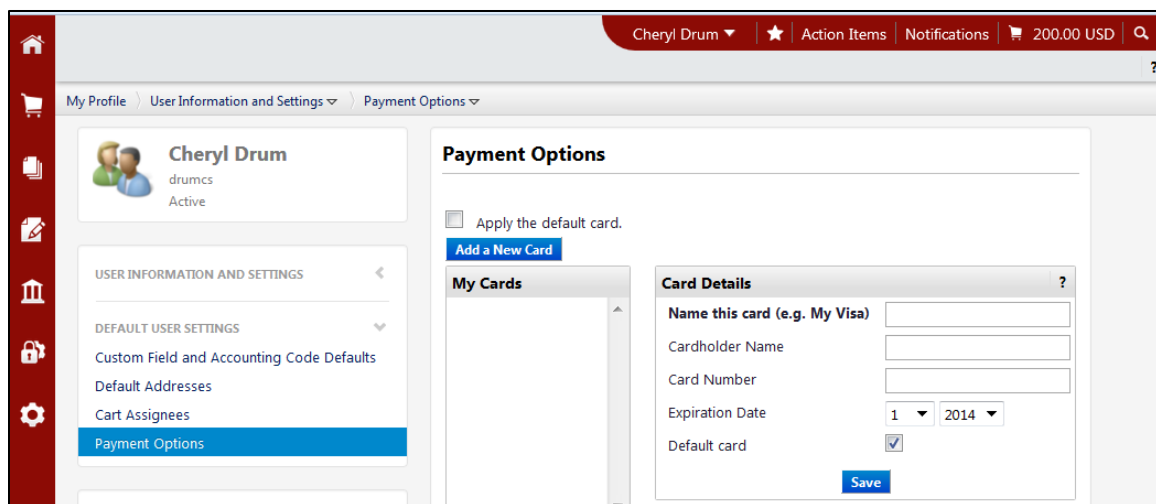


The following window will open:



Select Payment Options from the menu. The page will open to allow the user to add a new card number and store it securely.

Click the blue *Add a New Card* button and fill in the PCard information under the card details fields.



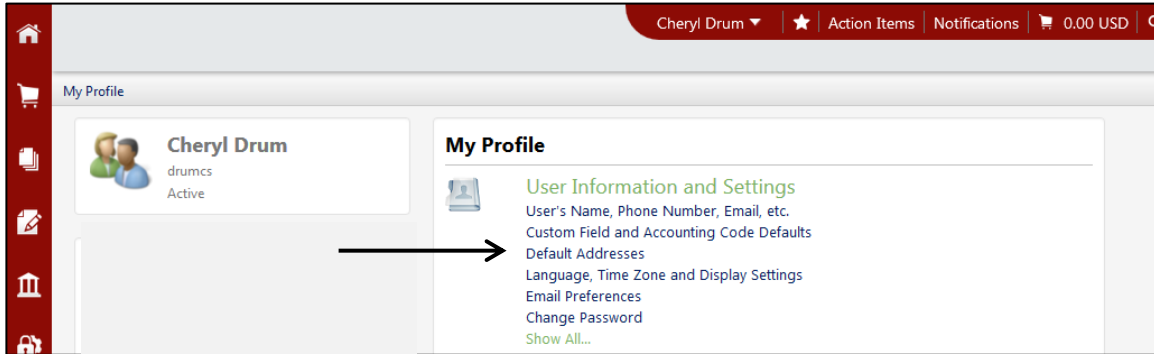
**Do not check** the “Apply the default card” checkbox or all of the orders will be paid through the PCard by default instead of through Accounts Payable.

Storing the card information in the user profile will speed up the check-out process when paying with the PCard.

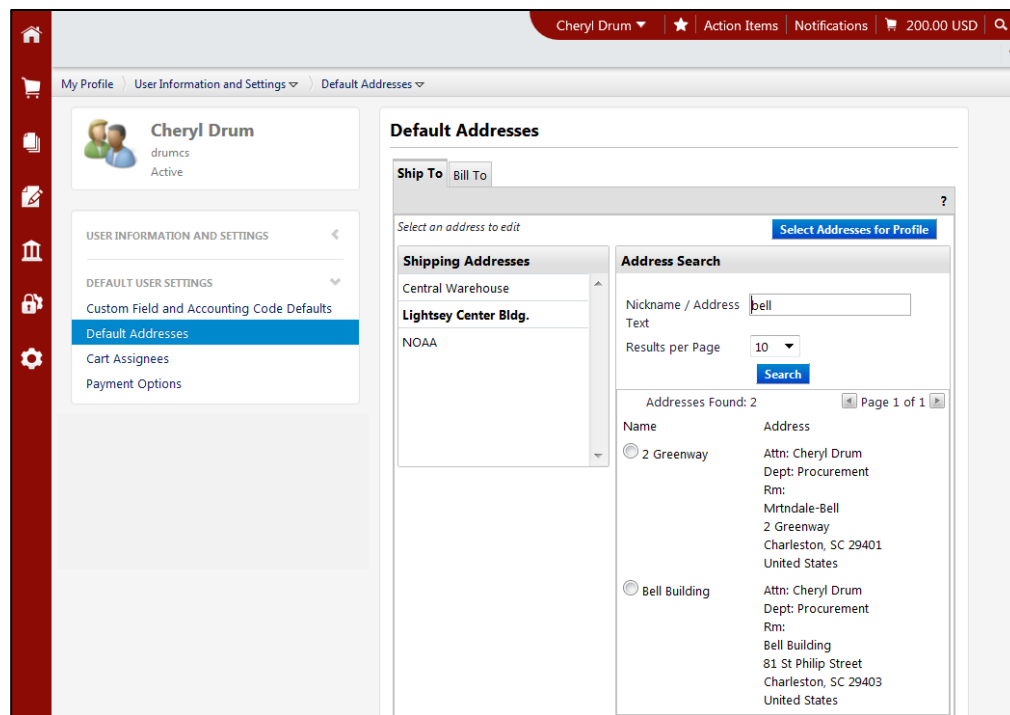
**When finished, click the Save button!**

## Adding a Default Ship-To Address

The user's default address will need to be added to their profile. Click on the *Default Addresses* line within the user's profile.




To add a Ship-To address, click on the blue *Select Addresses for Profile* button. This will open a search box. Search for a College of Charleston address by entering either a partial name in the *Nickname* or *Address Text* field.



As illustrated in the screenshot above, entering “Bell” in the *Nickname* field will retrieve the Bell Building address. Alternately, entering “81” in the *Address Text* field will also return the Bell Building address.

**The Procurement Office recommends searching by the Address Text field.**

Once the desired address is located, select it by clicking on the radio button (  ) next to the building name. The next step allows the user to customize the address by assigning it a nickname, a default Attention-To person, Department and Room Number. The address can be set as the default address in this step by ticking the “Default” checkbox.

Users can add multiple addresses to their profile. During the check-out process, the ship to address can be changed from the default address to one in the profile. This is helpful if ordering for different locations.

**Be sure to click the Save button when finished!**

# Shopping

Shopping with eProcure is very similar to shopping online at sites such as Amazon. All items to be ordered are first placed into a shopping cart. Once the cart contains all items for the order, the order is submitted by taking the cart through the “check out” process.

## Shopping Roles

The requisition process in eProcure is divided between different roles:

- **Shopper:** This is the default role, and any user can be a Shopper. A Shopper has the ability to find and add items to a cart, but does not have the ability to submit a cart for ordering. A Shopper may assign a shopping cart they have created to a Requisitioner or to an Approver.
- **Approver:** An approver can do anything a Shopper can do, but an Approver can also submit carts for order up to their authorized dollar amount.

## Types of Shopping

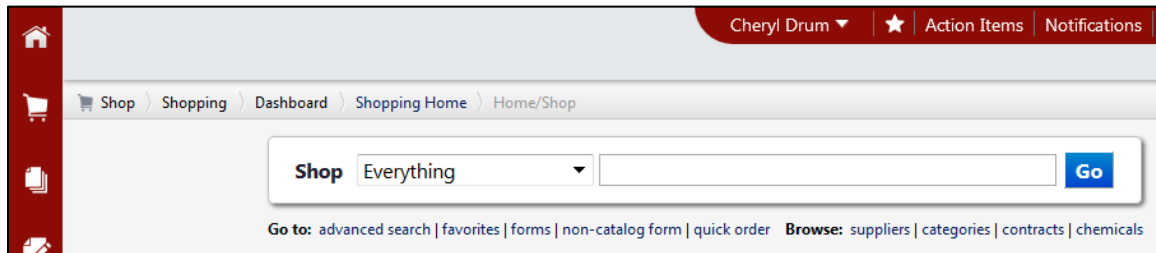
There are three ways to order items within eProcure:

- **Hosted Catalogs:** Hosted catalogs are vendors whose catalogs have been downloaded to our site. An advantage to having these catalogs hosted within eProcure is that the user has the ability to check the product details of the catalog items and compare prices and specifications, much like any major electronic shopping website.
- **Punch-out Suppliers:** Punch-outs are vendors whose catalogs are not hosted on our site. When the user clicks on a Punch-out Supplier, they are connected to the supplier’s website. On that website, the user will create the order, and when finished shopping the items in the cart will be transferred back to eProcure and will appear within the user’s active eProcure cart.
- **Non-Catalog Suppliers:** Much of the ordering that is done at the College will be done through Non-Catalog item shopping since the majority of the College’s suppliers are not electronically integrated with eProcure and do not support electronic ordering in this fashion. This type of order is similar to filling out a paper requisition. It requires the name of the supplier, a description of the product or service and the quantity and cost of the product or service.

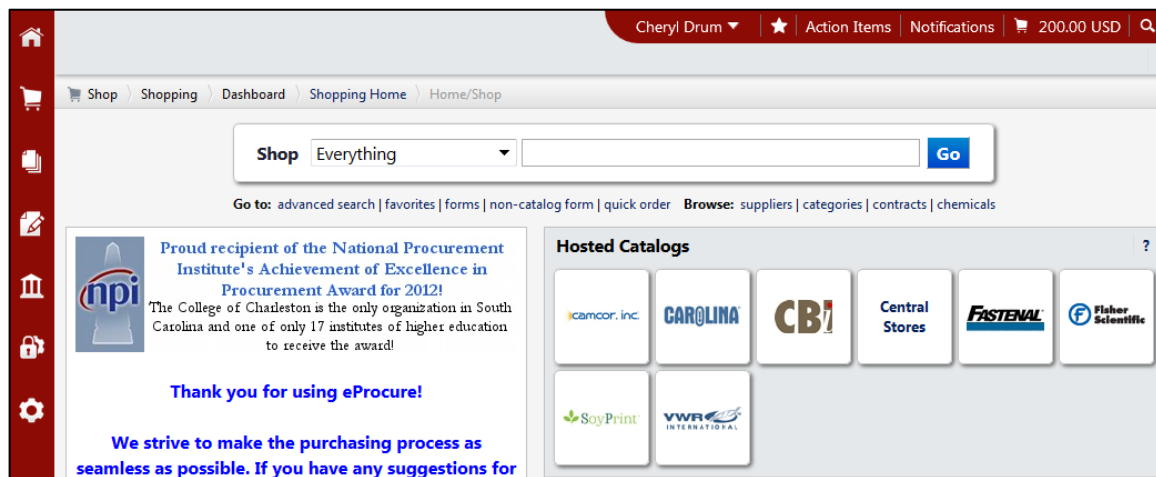
## Hosted Catalog Suppliers

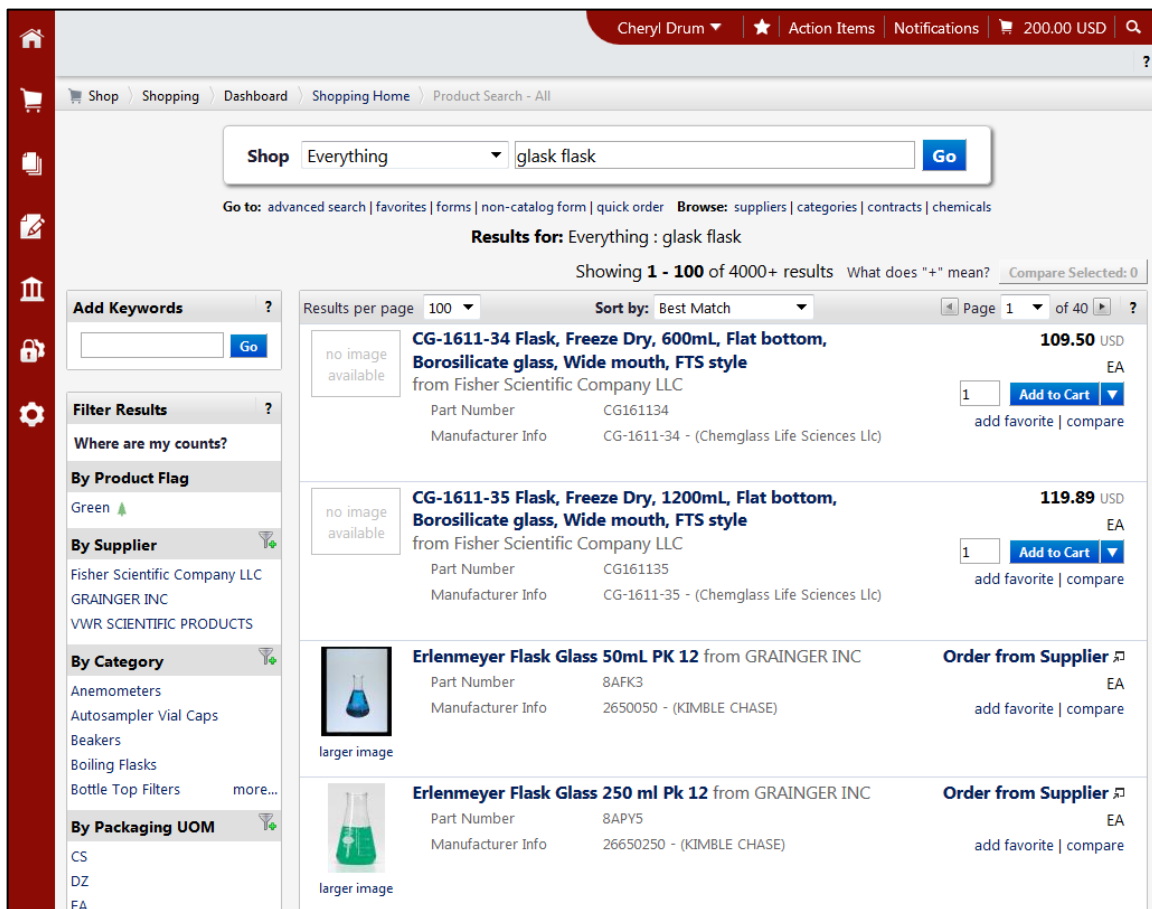
Hosted suppliers appear on the top of the main shopping page. Use the “Shop” field at the top search bar to search all suppliers and add items to the order.

Similar to an internet search engine, the user can perform a broad search using only a couple of words such as “glass flask,” or a very specific search with additional search terms (i.e. “glass flask 500ml stopper”). Using specific search terms yields fewer and more specific results.



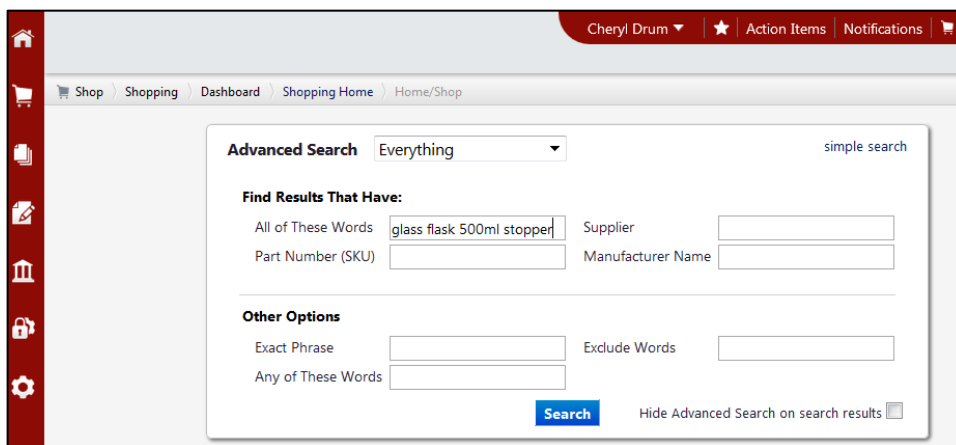
Alternately, click on the catalog icon to search only within the suppliers' catalog in eProcure.





In the above picture, 4,000+ items were found for the search terms "glass flask." Narrow the results by adding Keywords or by the Filter Results box to the left of the item list.

An advanced search is accomplished by clicking the *advanced search* link below the search bar. See screenshot below.



This will expand the search area to include new fields to choose from such as Part Number (SKU), Supplier, and Manufacturer Name.

**Results for:** Everything : glass flask 500ml stopper

Showing 1 - 100 of 224 results [Compare Selected: 0](#)

Results per page: 100 Sort by: Best Match Page 1 of 3

**Add Keywords**  [Go](#)

**Filter Results**




**By Supplier**

- Fisher Scientific Company LLC (107)
- GRAINGER INC (2)
- VWR SCIENTIFIC PRODUCTS (115)

**By Category**

- Beakers (1)
- Deuterated Solvents (4)
- Erlenmeyer Flasks (2)
- Flasks (78)
- Flat Bottom Flasks (1) [more...](#)

**By Packaging UOM**

	<b>E5667 Flask 500mL Red Glass Stopper Pk 6</b> from GRAINGER INC Part Number: 8XG17 Manufacturer Info: 92822G500 - (KIMBLE CHASE)	<a href="#">Order from Supplier</a> EA <a href="#">add favorite</a>   <a href="#">compare</a>
	<b>E5656 Flask 500mL Glass Stopper Pk 6</b> from GRAINGER INC Part Number: 9E888 Manufacturer Info: 92812G500 - (KIMBLE CHASE)	<a href="#">Order from Supplier</a> EA <a href="#">add favorite</a>   <a href="#">compare</a>
	<b>FLASK GLASS STOP 500 ML PK2 Hirschmann volumetric glass flask 500 mL class A TC according to ASTM E288 specifications tolerance +/- 0.20 mL with TS glass-stopper no. 19 with fine white graduation line and marking spot pack of 2</b> from VWR SCIENTIFIC PRODUCTS Part Number: 89025-758 (PK) Manufacturer Info: 282-G-500 - (HIRSCHMANN INC)	<b>65.31 USD</b> 1UNIT, PK <input type="text" value="1"/> <a href="#">Add to Cart</a> <a href="#">check availability</a> <a href="#">add favorite</a>   <a href="#">compare</a>

Once the desired item(s) are identified, there are several things that can be done:













- Add the item(s) to the Cart by clicking on the blue *Add to Cart* button
- Compare two or more items by clicking on the *compare* link underneath the *Add to Cart* button and then on the *Compare Selected* button on the top of the search results
- Add an item to the favorites list for easy access by clicking on the *add favorite* link next to the *compare* link.

## Punch-out Suppliers

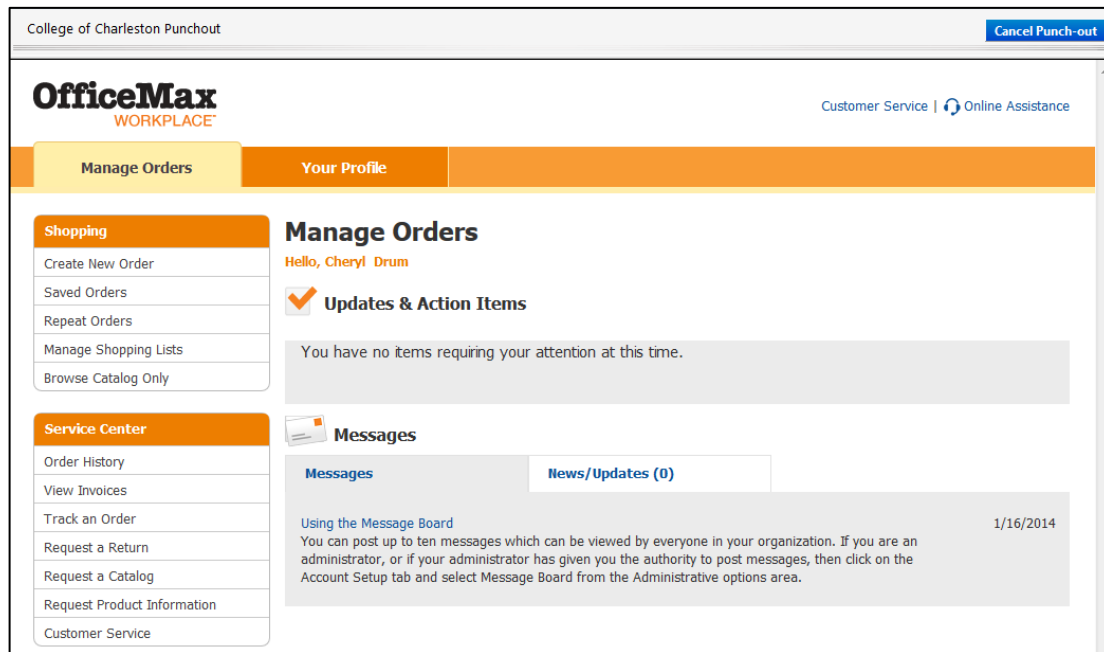
Punch-out Suppliers all have their own dedicated websites.

<http://procurement.cofc.edu/procurement-forms-and-procedures/>

**Punch-out**

For example, clicking on the OfficeMax logo will direct the user to the College of Charleston's Office Max punch-out site.

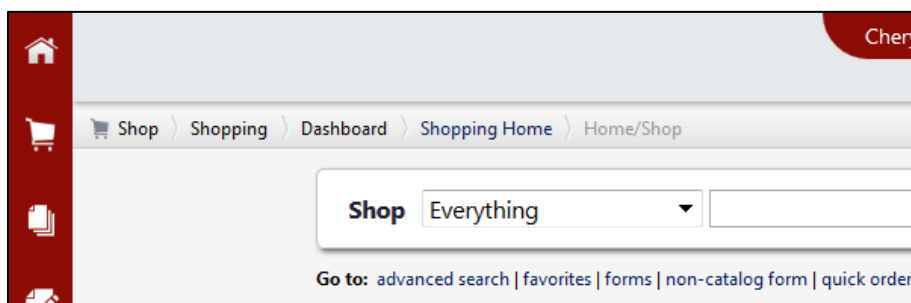


Each punch-out supplier has their unique website, each with a different layout. Shop within their site and build an order similar to shopping on any other website. Once the order is complete and goes through the checkout process, the items from the punch-out order will be transferred into the user's eProcure shopping cart. The order can then be submitted for approval.

To cancel the order and return to eProcure, the user should click on the blue *Cancel Punch-out* button at the top right of the screen.

## Non-Catalog Suppliers

To order goods or services from a vendor that is neither a *Hosted* nor a *Punch-out* Supplier, requires that item(s) be added to a shopping cart via the *Non-Catalog* Form. The link to the form can be found just below the "Shop" search field at the top search bar. Click on the link to open the *Non-Catalog* Form.



The screenshot below is an example of how the form looks in eProcure.

**Non-Catalog Form** Available Actions: Add and go to Cart **Go** **Close**

**Supplier Info**

Enter Supplier

or  
supplier search

If your purchase is over \$10,000 and you are not using a State-contracted vendor, it will need to be bid out. Please use "NEEDSBID" as your vendor

If your vendor is a new vendor, please:

- Select (by typing) "UNKNOWN" in the Supplier box, and
- Fill out the [New Supplier Request or Change Form](#) along with the company's [IRS W-9 Form](#) and attach them to your order in the checkout

**General Info**

Product Description	Catalog No.	Quantity	Estimated Price	Packaging (UOM)
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	EA - Each

254 characters remaining [expand](#) | [clear](#)

**Product Details**

Commodity Code  [search...](#)

Manufacturer Name

Manufacturer Part No

Health and Safety

- ☐ Controlled substance
- ☐ Recycled
- ☐ Hazardous material
- ☐ Radioactive
- ☐ Rad Minor
- ☐ Select Agent
- ☐ Toxin
- ☐ Energy Star
- ☐ Green

**Total** 0.00

**The fields highlighted in yellow are required to place an order.**

On the form, enter the name of the supplier, a description of the good or service, quantity requested, the price estimate per item, how the item is packaged and finally the commodity code of the item or service. Complete other fields as applicable and as the information is readily available.



**Do not confuse Quantity and Packaging!**

For example, an order is for 2000 widgets that are packaged in lots of 500. Enter a quantity of "4", "500" in the packaging field, and select "Lot" for the UOM from the drop-down menu.

Search for commodity code of the good or service by clicking on the [search](#) link next to the commodity code text box. This will open a search window in which the user can search for the commodity code by using a partial number, full number or description.



A screenshot of a web browser window showing a popup titled "Commodity Code Search". The browser's address bar displays the URL: https://solutions.sciquest.com/apps/Router/CommodityCodeSearchPopup?ElementId=Line\_Re. The popup has a "Close" button in the top right corner. Inside the popup, there is a section with a minus icon and the title "Commodity Code Search" followed by a question mark icon. Below this, there are two input fields: "Code starts with..." and "Description contains...". A blue "Search" button is positioned below these fields.

Commodity codes are standard classification codes for products and services used to detail where money is spent within an organization. It describes the item being purchased. For example, if purchasing software, the commodity code would describe the type of software (e.g. charting software, accounting software).

After identifying the appropriate code, click on the *select* link to the right of the description and the commodity code will appear within the field on the Non-Catalog Form.

**At the end of this manual are “cheat sheets” for the most frequently used codes.**

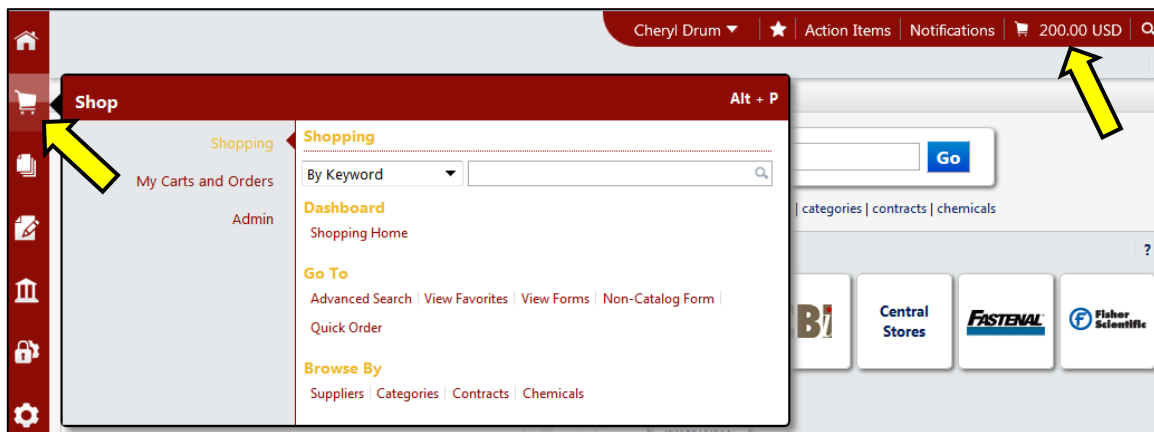
To add multiple line items or services to the order from the same supplier, click on the “Available Actions” drop-down menu, choose “Add to Cart and Return”, and click the Go button.

Remember to add an additional line item for shipping goods/equipment. If the freight charge is not on the quote, estimate the charges to be 10 – 15% of the total cost.

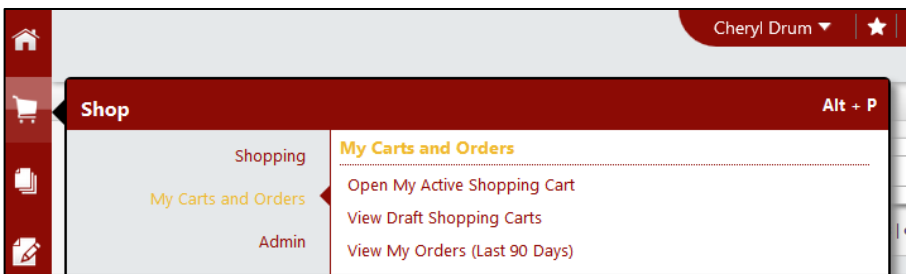
If finished with the order, choose “Add and go to Cart” from the drop-down menu and click the Go button. This action will open the shopping cart and all the line items entered.

# Shopping Carts

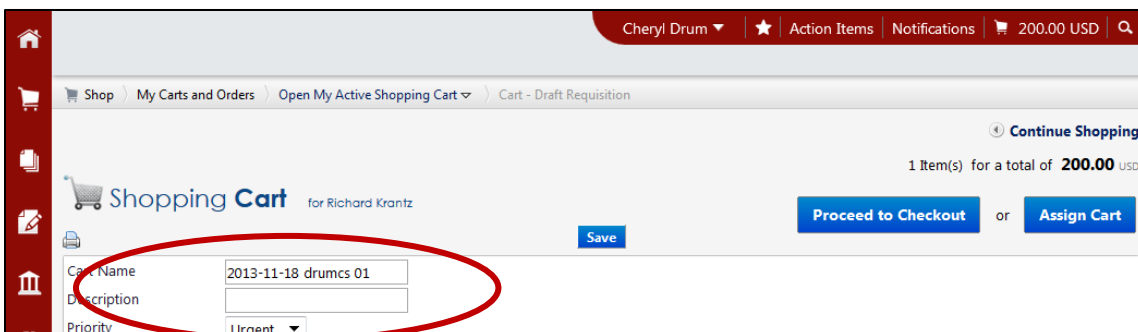
The shopping cart is where items reside until the user is ready to submit the cart to become an order. Access active, draft and assigned carts by clicking on the shopping cart icon on the left menu bar or by clicking in the cart area at the top right-hand corner of the homepage (see yellow arrows).



Opening the *carts* tab will generate several options. Click on the *My Carts and Orders* from the menu list. From here, select the active cart, view draft carts or previous orders.



Clicking on *Open My Active Shopping Cart* will open the active cart. Each cart that is created will be named <today's date> + <username> + 01 (02, 03...). Any shopping cart can be renamed by typing over the default name in the *Cart Name* text box (blue circle).



**Be sure to click the *Save* button when finished renaming the cart!**

## Managing Carts

It is possible to have multiple carts at one time (screenshot below). To create a new cart, click on the *View Draft Shopping Carts* line from the *My Carts and Orders* Menu. This will list all of the user's draft shopping carts. The active cart is identified with a red shopping cart icon (🛒) instead of white (🛒).

Carts can be deleted if no longer needed. Simply click on the *Delete* button (red circle) to the far right of the cart.

To create a new, empty shopping cart, click on the *Create Cart* (black circle) button at the top left-corner of the screen. This cart will now become the active cart. The user can make any draft cart the active cart by clicking on the shopping cart icon next to the name of the desired shopping cart.

The screenshot shows the 'My Drafts' table with the following data:

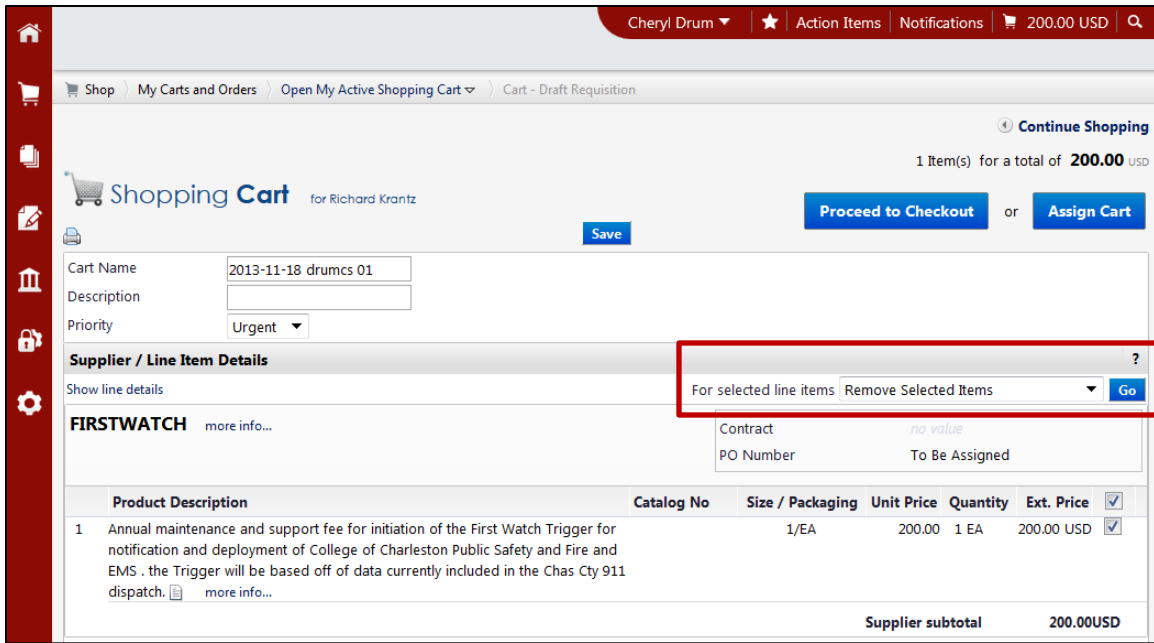
Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Delete
	<a href="#">2013-03-19 drumcs 01</a>	3/19/2013		4,758.66 USD	<a href="#">Delete</a>
	<a href="#">2013-11-08 drumcs 01</a>	11/8/2013		1,057.02 USD	<a href="#">Delete</a>
	<a href="#">2013-11-18 drumcs 01</a>	11/18/2013		200.00 USD	<a href="#">Delete</a>
	<a href="#">2014-01-16 drumcs 01</a>	1/16/2014		0.00 USD	<a href="#">Delete</a>

## Managing Items in the Cart

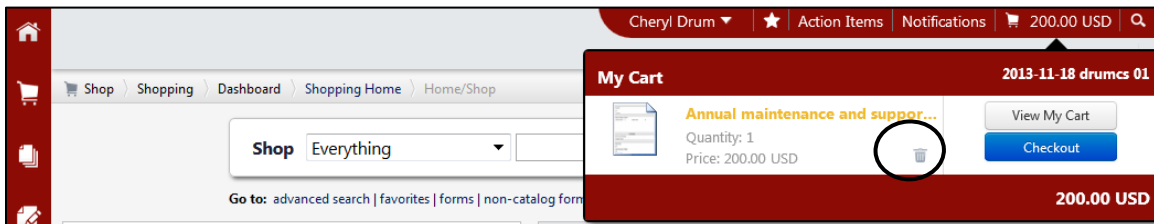
Occasionally, a user may need to delete or move items within a shopping cart. To do so, open up the shopping cart by clicking on the *Shopping Cart Name* hyperlink. (See screenshot next page)

Find the line(s) that need to be changed or deleted and place a check mark in the checkbox on the right-hand side of the line (red oval).

Next, select an option from the "For selected line items" drop-down menu. Once the desired action is selected, click on the *Go* button next to the drop-down menu for the request to process (red rectangle).



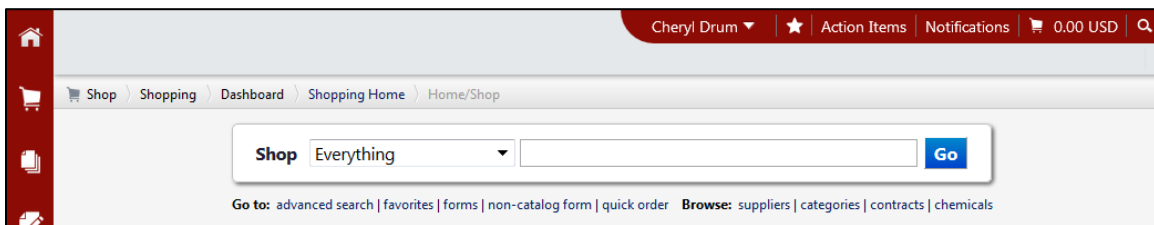
Alternately, if only deleting items from the active shopping cart, the user can click on the active cart icon at the top-right hand corner of the home/shop page.



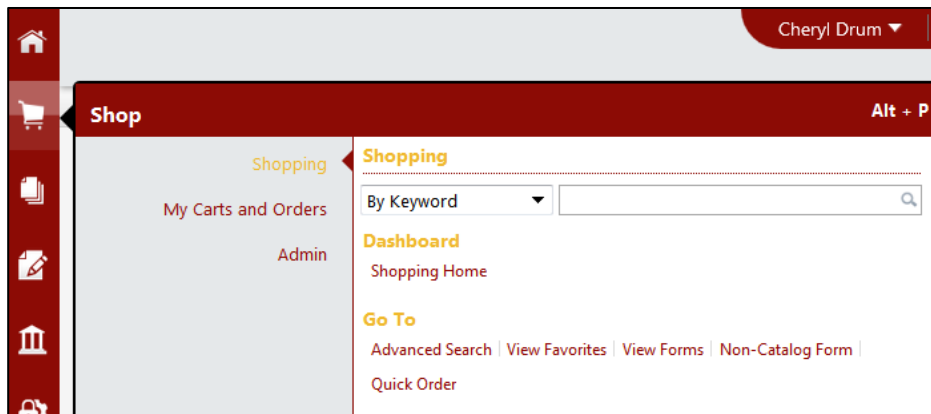
From this screen, click on the trash can icon (black circle) next to the item to be deleted. Also, from this screen, the user can proceed to the check-out process or view the shopping cart.

## Favorites

Favorites are shortcuts to frequently used items or forms. The user's favorites can be accessed through the *favorites* link below the Shop search field on the home/shop page.



Or, click on the *Shopping Cart* icon. Select *View Favorites* from the *Go To* sub-menu.



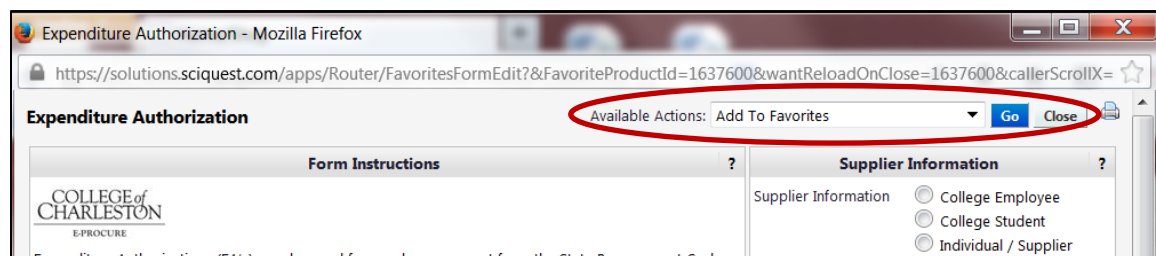
The following types of items or requests can be saved as favorites:

- Hosted items
- Punch-out Items (limited, few suppliers support this feature)
- Non-Catalog items
- Populated Forms (such as an Expenditure Authorization)

There are multiple ways offered throughout eProcure to add an item to the favorites list. See the following screenshots for examples of these options. From the search results:



From a form:



Within the shopping cart:

Cheryl Drum | Action Items | Notifications | 4,758.66 USD

Shop | My Carts and Orders | Open My Active Shopping Cart | Cart - Draft Requisition

Continue Shopping

28 Item(s) for a total of 4,758.66 USD

Proceed to Checkout or Assign Cart

Save

Cart Name: 2013-03-19 drums 01

Description:

Priority: Normal

Supplier / Line Item Details

Show line details

For selected line items Add To Favorites Go

APPLE COMPUTER INC more info...

Contract: No Contract

PO Number: To Be Assigned

The item(s) in this group was retrieved from the supplier's website. What does this mean?

Need to make changes? MODIFY ITEMS | VIEW ITEMS Item(s) was retrieved on: 11/25/2013 11:49:23 AM

Line(s): 1

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 IPAD AIR SMART CASE BLACK-USA more info...	MF051LL/A	EA	79.00	1 EA	79.00 USD	
Supplier subtotal					79.00USD	

Using any of these options will launch a new window which asks the user to specify a nickname for the item and a destination folder. If a personal folder is not already set-up, click on the *New* button and follow the prompts.

Add To Favorites

Step 1: Edit Item Details

Item Nickname: Expenditure Authorization Quantity: 500

from CHARLESTON COUNTY GOVERNMENT

Add Description

Step 2: Select Destination Folder

New

Personal

My Favorites

Shared

Apple Software

Forms

Microsoft Office Licenses

Xerox Renewal

Submit Cancel

## Checking Out

Once all desired goods and services are added to the cart, it is ready to be submitted to become an order. If a user has only Shopper permissions, the cart must be assigned to a Requisitioner to submit the cart for ordering.

To begin, open the active cart and click on the *Proceed to Checkout* button. This will bring the user to the following screen:

The green progress arrow bar on the top alerts the user to any incomplete information in the order. The symbol means that there is a required field that is missing. Once all fields have been completed, the warning will change to a symbol, indicating that the user is clear to proceed.

## Shipping Information

In the above screenshot, the Shipping information and Accounting Codes need to be added before the order can be submitted. To edit the Shipping information, click on the Shipping area of the progress arrow. Click on the blue *edit* button or and follow the prompts to change this address. Please note that eProcure will default to the user's ship-to location created in the user's profile and the attention message regarding the ship-to location will not be generated.

**Do not forget to change the ship-to location if not shipping it to the default address!**

The delivery requirement is also a mandatory field. This is information that is sent to the supplier. Click on the blue *edit* button in the Delivery Requirements section of the Shipping box. Use the calendar next to the *Required by date* field to ensure accurate date formatting.

## Billing

By default, eProcure is setup to pay for purchases through Accounts Payable via the use of a Purchase Order. However, a PCard can be used to pay for the purchase instead. To make this election, click on the Billing section of the progress bar.

The screenshot shows the eProcure interface with the 'Billing' section highlighted in the progress bar. A yellow message box states: 'You have completed the required information in this step. At this point, you can do the following: Proceed to the next step: Accounting Codes. Go straight to the end: Final Review.' The 'Billing' tab is selected in the sub-navigation bar. A blue text box on the left explains: 'If the “No credit card has been assigned” message is underneath the “Credit Card Info” section, then the order will not be paid via a PCard. If the credit card information is in that section but the PCard will not be used to pay for this order, click on the blue *edit* button and then choose the blue *Clear* button in the pop-up box.' On the right, the 'Billing' section is shown with 'Bill To' information (Accounts Payable, College of Charleston) and 'Credit Card Info' (No credit card has been assigned). The 'Billing Options' section shows 'Accounting Date' as 'no value'. Red boxes highlight the 'Credit Card Info' and 'Billing Options' sections.

Click on the blue *edit* button next to “Credit Card Info”. eProcure allows the user to either enter a new credit card or to choose from a card already stored in the user’s profile.

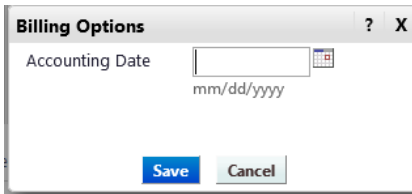
The 'Credit Card Info' pop-up box contains instructions to complete fields for credit card information or to add a new card. It includes a 'Card Details' section with fields for 'Cardholder Name', 'Card Number', 'Card Security Code', and 'Expiration Date' (set to 1/2014). At the bottom are 'Save', 'Cancel', and 'Clear' buttons.

## Choosing a Fiscal Year

Click on the Billing section of the progress bar. To place an order against the next fiscal year, click on the blue *edit* button next to *Billing Options* (see above screenshot).



A pop-up box will appear that allows the user to choose an “Accounting Date.”

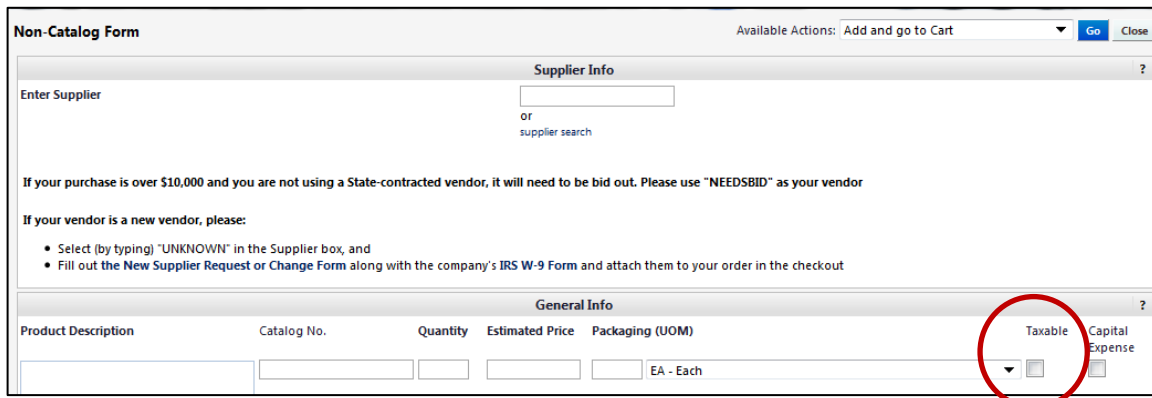
A small dialog box titled "Billing Options" with a question mark and close button in the top right. It contains a label "Accounting Date" followed by a date input field with a calendar icon. Below the input field is the text "mm/dd/yyyy". At the bottom are "Save" and "Cancel" buttons.

Anything after June 30<sup>th</sup> of the current fiscal year will set the order to be paid from the next fiscal year's budget.

***Please note that it is not necessary to fill in this information for orders being paid from the current fiscal year's budget, only the next fiscal year.***

## Sales Tax

eProcure will add sales tax to shopping carts containing items from hosted and punch-out catalogs. If creating the shopping cart using the Non-Catalog Form, check the “Taxable” checkbox if purchasing goods or equipment.

A screenshot of the "Non-Catalog Form" in a web application. The form has a title bar with "Non-Catalog Form" and "Available Actions: Add and go to Cart" with "Go" and "Close" buttons. The main content area is divided into sections: "Supplier Info" with a text input for "Enter Supplier" and a "supplier search" button; a note about purchases over \$10,000; and instructions for new vendors. Below this is the "General Info" section, which contains a table with columns: "Product Description", "Catalog No.", "Quantity", "Estimated Price", "Packaging (UOM)", "Taxable", and "Capital Expense". The "Taxable" column has a dropdown arrow and a checkbox, which is circled in red. The "Capital Expense" column also has a checkbox. The table has one row with "EA - Each" in the "Packaging (UOM)" column.

## Accounting Codes

**Accounting codes must be completed for every order.**

There are two fields in the Accounting Codes section, Index and Account.

- **Index** is the **fund** number the order is charged against
- **Account** is the broad **expense** category describes the good or service

Click on the blue edit button to enter the index and account numbers. If the number is unknown, the user can search for this information either by number or by the alpha description. Click on the *Select from all values* link to start the search.

Type the description of the index in the field and click the blue Search button.

View the results and select the correct index.  
This will automatically populate the field with the user's selection.

**Be sure to click the Save button when finished!**

It is possible for a user to save index-account code combinations in their profile. These combinations can be given a nick-name. During the check-out process, the user can select the appropriate combination from the code favorite's drop-down menu. This will populate both the index and the account code.

This will not work for all purchases, but will save time for those frequent purchases.

The 'Accounting Codes' window displays a 'Select from your code favorites' dropdown menu with 'Office Supplies' selected. Below this is a table with two columns: 'Index' and 'Account'. The 'Index' column has a search box with 'Select from profile values...' and 'Select from all values...' options, and a 'Required field' indicator. The 'Account' column has a search box with 'Select from all values...' and a 'Required field' indicator. To the right of the 'Account' column is an 'add split' link. At the bottom are 'Save' and 'Cancel' buttons.

## Splitting Orders

It is possible to split an order between different indexes, either per order or per line item.



*Splitting an order between indexes requires that the cart be assigned to a buyer in the Procurement Office instead of placing the order; otherwise the order will reject.*

To add an accounting code split for the whole order, click on the *add split* link in the Accounting Codes pop-up window:

The 'Accounting Codes' window displays a table with three columns: 'Index', 'Account', and '% of Price'. The 'Index' column has a search box with 'Select from profile values...' and 'Select from all values...' options, and a 'Required field' indicator. The 'Account' column has a search box with 'Select from all values...' and a 'Required field' indicator. The '% of Price' column has a search box with '0' entered. To the right of the '% of Price' column is an 'add split' link, which is circled in red. Below the table are 'Save' and 'Cancel' buttons. At the bottom right, there are links for 'recalculate / validate values' and 'show monetary calculations'.

This will add an additional line that will allow the user to change both the Index and the Account. Orders can be split by percentage of the subtotal of the order, percentage of the quantity of the order or by a specific dollar amount. The drop-down menu to the left of the *add split* link dictates how the split will be applied.

**Please note that when adding a per-order accounting code split, that a per item accounting code split cannot also be added.**

To split accounting codes per item, scroll down to the "Supplier/Line Item Details" section and click on the blue *edit* button next to the item that needs specific accounting codes.

NEW VENUE TECHNOLOGIES INC <a href="#">more info...</a>						
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 MS Office for Mac License <a href="#">more info...</a>		1/EA	42.07	1 EA	42.07 USD	<input type="checkbox"/>
<b>Accounting Codes</b> values have been overridden for this line						
Index	Account					<a href="#">edit</a>
110016 Procurement	770114 Software Purchase					
<a href="#">copy to other lines</a>						
Supplier subtotal					42.07	
Tax1					0.00	
Tax2					0.00	
Supplier total					42.07 USD	

OFFICE MAX CONTRACT INC <a href="#">more info...</a>						
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
2 HP LJ PRO M451DN <a href="#">more info...</a>	M3CE957A#BGJ	EA	637.00	1 EA	637.00 USD	<input type="checkbox"/>
Accounting Codes (same as header)						
					<a href="#">edit</a>	
Supplier subtotal					637.00	
Tax1					54.15	
Tax2					0.00	
Supplier total					691.15 USD	

Change the accounting codes in the subsequent pop-up box. Note that it is possible to split the accounting codes within a single item as well. To do so, click on the *add split* link and follow the same procedure as above.

## Fair & Reasonable Price

SC Procurement Laws state that purchases up to \$10,000 must be deemed and certified “fair and reasonable” by the purchaser. This certification must be made on every order in eProcure.

Shop | My Carts and Orders | Open My Active Shopping Cart | Fair and Reasonable Price - Draft Requisition

☒ General
 ☒ Shipping
 ☒ Billing
 ☒ Accounting Codes
 ☒ Fair and Reasonable Price
 ☒ Internal Notes and Attachments
 ☒ External Notes and Attachments
 ☒ Final Review
 [Assign Cart](#)

[Return to shopping cart](#)
[Continue Shopping](#)

**Almost ready to go! The list below needs to be addressed before the request can be submitted.**

- Required field: Do you certify this purchase is fair and reasonable?

[Requisition](#)
[PR Approvals](#)
[PO Preview](#)
[Comments](#)
[Attachments](#)
[History](#)

[Summary](#)
[Shipping](#)
[Billing](#)
[Accounting Codes](#)
[Supplier Info](#)
[Taxes/S&H](#)

Hide value descriptions

**Fair and Reasonable Price** ?

These values apply to all lines unless specified by line item

**If requisition is under \$10,000, you must certify the price is fair and reasonable** [edit](#)

Do you certify this purchase is fair and reasonable?

☒ Required field

To make this certification in eProcure, answer yes/no using the dropdown box on the Fair and Reasonable screen:

**If requisition is under \$10,000, you must certify the price is fair and reasonable** ? X

Do you certify this purchase is fair and reasonable?

☒ Required field

[Save](#)
[Cancel](#)

## Internal / External Notes and Attachments

Both the Notes and Attachment screens allow input of a personalized note or attachment of a file (such as a PDF, an Excel spreadsheet, etc.). Like it sounds, Internal Notes and Attachments can only be viewed internally at the College, however External Notes and Attachments will be sent to the supplier.



*External Notes and Attachments are seen by the supplier **only** when ordering Non-Catalog items. Hosted and Punch-out Suppliers **cannot receive** external notes or attachments.*

## Final Review

Once every section in the progress bar is complete, the last step is to review the *Final Review* screen to ensure all of the order information is complete and accurate. It is at this step that a cart may either be assigned to or be submitted for ordering by a Requisitioner.

To submit the cart, click on the blue *Place Order* button (see screenshot next page).

Cheryl Drum ★ Action Items Notifications 4,758.66 USD

Shop My Carts and Orders Open My Active Shopping Cart Summary - Draft Requisition

General Shipping Billing Accounting Codes Fair and Reasonable Price Internal Notes and Attachments External Notes and Attachments Final Review Assign Cart

Return to shopping cart Continue Shopping

All done! The required information has been completed and this request is ready to be submitted.  
Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition PR Approvals PO Preview Comments (1) Attachments History

Summary Shipping Billing Accounting Codes Supplier Info Taxes/S&H

Hide header Hide value descriptions

General	Shipping	Billing
<b>Cart Name</b> 2013-03-19 drums 01 <a href="#">edit</a> <b>Description</b> no value <b>Priority</b> Normal <b>Prepared by</b> Cheryl Drum <b>Prepared for</b> Cheryl Drum	<b>Ship To</b> <a href="#">edit</a> Attn: Cheryl Drum Dept: Procurement Rm: 853 Lightsey Center Bldg. 160 Calhoun Street Charleston, SC 29401 United States  <b>Delivery Requirements</b> <a href="#">edit</a> Expedite <span style="color: red;">x</span> Ship Via Best Carrier-Best Way Required by date 2/4/2014  <a href="#">View/edit by line item...</a>	<b>Bill To</b> <a href="#">edit</a> Accounts Payable College of Charleston 66 George St Charleston, SC 29424 United States  <b>Credit Card Info</b> <a href="#">edit</a> No credit card has been assigned. <a href="#">manage your cards...</a>  <b>Billing Options</b> <a href="#">edit</a> Accounting Date 7/1/2013  <a href="#">View/edit by line item...</a>

Accounting Codes

Index	Account
110076 Office Of First Lady	720132 Data Processing Equipment - Tagged

Fair and Reasonable Price Internal Notes and Attachments External Notes and Attachments

If requisition is under \$10,000, you must certify the price is fair and reasonable [edit](#) Internal Note no note [edit](#) Internal Attachments Note to all Suppliers no note [edit](#) Notes for the

If the *Place Order* button is not visible, the user is not a requisitioner and must assign the cart in order for it to become a requisition and eventually a purchase order. Click on the *Assign Cart* button to assign the cart to a Requisitioner. This action will open a pop-up window, allowing the user to choose another employee who has the role of Requisitioner and assign the cart to them.

**Assign Cart** ? X

Assign Cart To: Select from profile values  
Search for an assignee

Note To Assignee:

[expand](#) | [clear](#)

Note: After a cart is submitted, it can be viewed via History.  
Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.

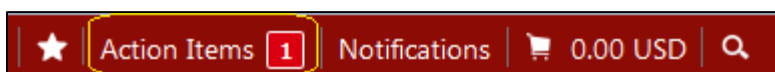
[Assign](#) [Cancel](#)

From this window, search for the desired assignee or select from a previously added list of Cart Assignees (this list can be created in the user's profile settings). A note to the assignee can be added at this screen as well. Click on the *Assign* button to send the cart to the Requisitioner for approval. The Requisitioner will receive an email notification that a cart has been assigned and is awaiting action.

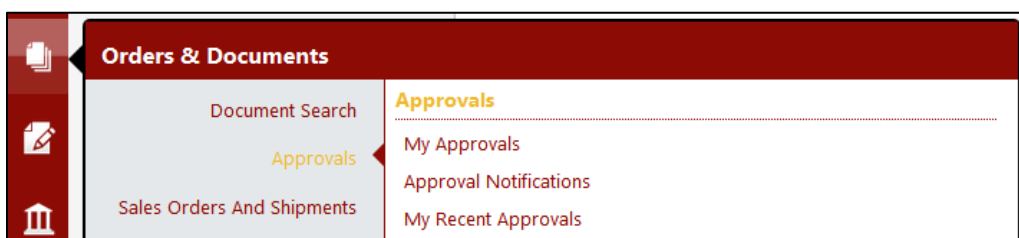
# Approving

Requisitioners and Approvers will need to approve orders from time to time. eProcure is set-up so that when an approval is required; an automated email is generated and sent to all available approvers. There are two ways to access pending approvals after logging into eProcure.

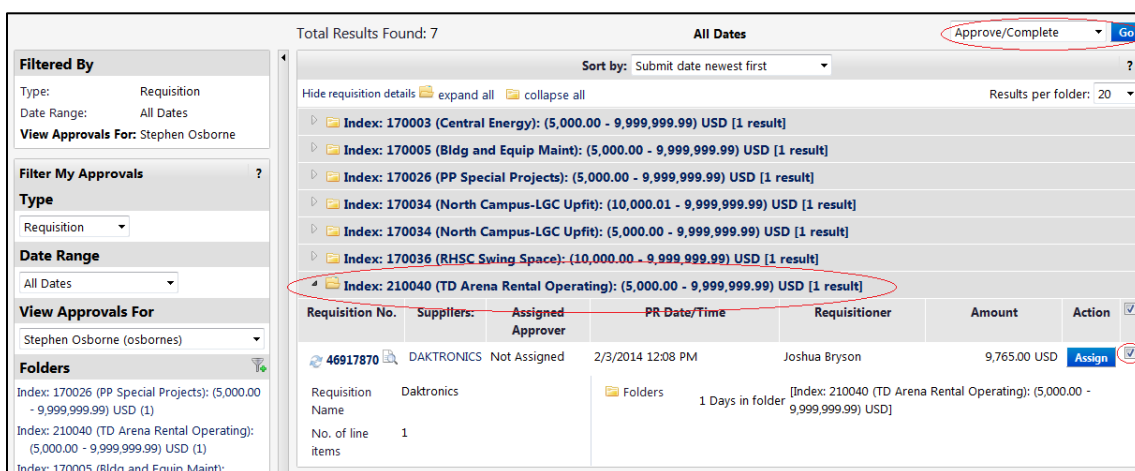
The first step is to go to the Action Items box, which is located on the top right-hand section of the main page next to your user name. Clicking on the *Action Items* link in this box will expand the menu, showing everything that is waiting for the user's attention.



The other way to access approvals is via the *Orders & Documents* menu from the Main navigation bar. Select *Approvals* and then *My Approvals* from the menu.



Clicking on either the navigation bar or the *Action Items* link will bring you to a page that looks like the following screenshot:



To approve an order that does not need any modification:

1. Expand the shared workflow folder by clicking on the folder name. In the above screenshot, the folder entitled “Index: 210040 (TD Arena Rental Operating): (5,000 – 9,999,999.99) USD” is opened.
2. In the expanded folder, orders that need your approval or that can be assigned to someone (including yourself – see the My PR Approvals section below) appear. Tick the checkbox next to the requisition(s) to be approved.
3. Choose “Approve/Complete” from the drop-down menu and click on the Go button.

## My PR Approvals

Approval folders in eProcure are usually shared among several approvers. It is possible to approve an order directly from the shared folder – as the above directions show how – but it is also possible to assign an order directly to someone. When that occurs, only that person can approve the order, and the order will show in both the shared workflow folder and also in the assignee’s personal folder - “My PR Approvals”.

Total Results Found: 5      All Dates      Assign      Go

Sort by: Submit date newest first      ?

Hide requisition details      expand all      collapse all      Results per folder: 20

**My PR Approvals [1 result]**

Requisition No.	Suppliers	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
47240657	NEEDS8ID	Phil Stevenson	2/4/2014 11:37 AM	Paty Cowden	18,000.00 USD	Approve

Requisition Name: Open bid for Pinestraw contract      Folders: 0 Days in folder [My PR Approvals]

No. of line items: 1      0 Days in folder [Pre Bid Review]

This PR has notes: ✓

**Pre Bid Review [5 results]**

Requisition No.	Suppliers	Assigned Approver	PR Date/Time	Requisitioner	Amount	Action
47240657	NEEDS8ID	Phil Stevenson	2/4/2014 11:37 AM	Paty Cowden	18,000.00 USD	Assign

Requisition Name: Open bid for Pinestraw contract      Folders: 0 Days in folder [My PR Approvals]

No. of line items: 1      0 Days in folder [Pre Bid Review]

This PR has notes: ✓

**Current Workflow Step**

Clicking on the blue *Assign* button in a shared workflow folder assigns that order to the user’s own “My PR Approvals” folder. From there, click on the blue *Approve* button to approve it. This accomplishes the same thing as approving it directly from the shared folder as shown above.

The order can also be assigned to someone else by ticking the checkbox next to the order and using the “Assign” option from the drop-down menu. To un-assign an order from “My PR Approvals”, tick the checkbox next to the order and choose “Return to Shared Folder” from the drop-down menu. Click the blue *Go* button to complete the action.



## Approving Via Email

It is also possible to approve orders via an email order approval notice. This is a secure, fast and easy way to approve orders - even from off-campus. Users with approval authority can enable this feature by first navigating to their user profile. Then select the *User's Name, Phone Number, Email, etc.* from the *User Information and Settings* menu.

The screenshot shows the 'User's Name, Phone Number, Email, etc.' settings page. The 'Email Approval Code' field is highlighted with a red box. The code is currently empty, represented by dots.

Be sure to click the **Save** button when finished!



*The approval code must be at least six characters long.*

A **Take Action** button will now appear within the approval email.

The screenshot shows an approval email interface. At the top, it says 'TOTAL: 4,541.74 USD'. Below that, there's a section for 'Accounting Codes' with details: Chart: 1, Index: 720132 - Data Processing Equipment - Tagged. At the bottom, there's a prompt: 'Ready to approve, reject or assign this document to yourself?' followed by a yellow 'Take Action' button, which is circled in red.

Click on this button to open a secure website that will offer the following options:

- approve,
- reject, or
- return the order to the requisitioner

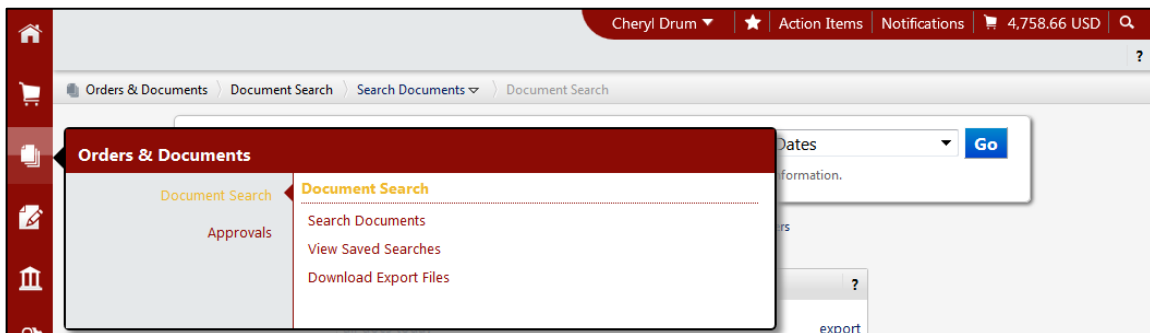
Procurement Office, College of Charleston	
Requisition	22777690
Status	Pending
Shopper	Amy Solomon
Approver	Wendy Williams
Select an action: <input type="radio"/> Approve <input type="radio"/> Assign to myself <input type="radio"/> Reject <input type="radio"/> Return to Requisitioner	
Comment (Optional): <input type="text"/>	
Enter your approval code to submit: <input type="text"/> <input type="button" value="Submit"/>	

Enter any comments on this order in the comment field. This is especially useful when an order is rejected or returned to the requisitioner. After choosing the appropriate action, the user will enter their unique approval code and click the *Submit* button.

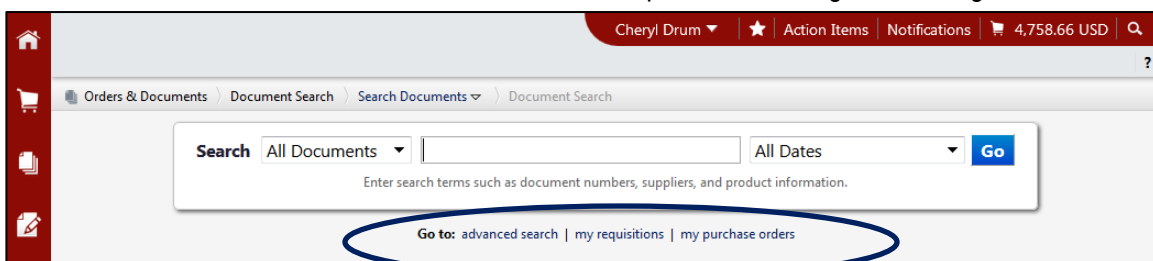
eProcure will generate one more confirmation pop-up box. After this box is answered, the approval process is complete!

## Document Search

The *Orders & Documents* menu will open up a search menu to search for requisitions and purchase orders. Searching this way is fast, flexible and can be customized. Click on the *Document* icon in the left navigation bar.



Click on Search Documents from the menu. This will open the following Search engine:



Located below the search box are links to ***my requisitions*** and ***my purchase orders***. Clicking on these links is the fastest way to find a user's orders from the last 90 days. The default search box is pictured above and it offers a few options in the drop-down menus.

If these options are not specific enough, conduct an *advanced search* by clicking the link in the *Go To* links. Pick from any option listed or combine multiple search criteria.

The screenshot shows a web application interface for document search. At the top, there are navigation links: "Orders & Documents", "Document Search", "Search Documents", and "Document Search". Below these, there are links: "Go to: simple search | my requisitions | my purchase orders". The main search form is titled "Search" and has a dropdown menu set to "All Documents". There is a "Go" button. The form is divided into three sections: "General Document Identification" with a "Document Number(s)" field; "Document Information" with fields for "Participant(s)", "Owner", "Date" (with a dropdown set to "All Dates"), "Total Amount", "Supplier", and "Department"; and "Item/Product Information" with fields for "Catalog Number(SKU)" and "Product Description". Below these are "Product Flags" with checkboxes for "Controlled substance", "Green", "Rad Minor", "Recycled", "Toxin", "Energy Star", "Hazardous material", "Radioactive", and "Select Agent". There is another "Go" button at the bottom of the form. At the very bottom, there are links: "Go to: simple search | my requisitions | my purchase orders".

## Receiving Orders

eProcure will send out an automated reminder email after the order is complete stating that a receipt is required once it has arrived (or services have been rendered). A receipt must be created in eProcure when goods/services are received.

First, locate the purchase order by clicking on the *Document Search* tab, then *my purchase orders* or by searching for the purchase order(s).

The screenshot shows a web application interface for document search. At the top, there is a user profile "Cheryl Drum" with a dropdown arrow, a star icon, and links for "Action Items", "Notifications", and a shopping cart icon with "4,758.66 USD". Below this is a navigation bar with "Orders & Documents", "Document Search", "Search Documents", and "Document Search". The main search bar has a "Search" label, a dropdown menu set to "All Documents", a text input field, a dropdown menu set to "All Dates", and a "Go" button. Below the search bar, there is a prompt: "Enter search terms such as document numbers, suppliers, and product information." At the bottom, there are links: "Go to: advanced search | my requisitions | my purchase orders".

Once the appropriate purchase order is identified, select the check box next to the purchase order total. Then, open the drop-down menu above the search results and select either “Create Quantity Receipt” or “Create Cost Receipt.”

COLLEGE of CHARLESTON  
E-PROCURE

Phil Stevenson profile | logout

2012-03-22 stevensonpj1.01 | 0 item(s), 0.00 USD

Search for Supplier Profile

home/shop document search approvals organization setup user management error management history more >>

search exports

start new search Go to: my requisitions | my purchase orders

Showing 1 - 1 of 1 results Last 90 days (12/24/2011 - 3/22/2012)

Results per page: 500 Sort by: Best match

Search Terms

Search Type

My Purchase Orders Search

Owner

Phil Stevenson

PO No	Supplier	Creation Date/Time	Requisition No.	Requisitioner	Supplier Status	Settlement Status	PO Total
P0008724	GOVCONNECTION INC	3/9/2012 2:29 PM	28265027	Phil Stevenson	Sent	Receipt-Required	47.41 USD

Create Quantity Receipt Go

Create Quantity Receipt

Create Cost Receipt

Create a *Quantity Receipt* for tangible goods and a *Cost Receipt* for services. In the above example, the Quantity Receipt is selected. Click the Go button to open the receipt box.

On this screen, complete any relevant information regarding the order under the *Receipt Summary* section (*Header Information* section is optional). Refer to the screenshot below. If all items were received as ordered, simply click on the *Complete* button.

If only part of the order was received, create a partial receipt by entering the actual quantity of items that were delivered. Create another receipt(s) for subsequent deliveries until the purchase order is fully received.

Cheryl Drum Action Items Notifications 4,758.66 USD

Orders & Documents Document Search Search Documents New Qty Receipt

Summary Comments (0) History

Delete Add PO Save Updates Complete

Exact Match: PO No. P0017899

Header Information

Receipt Name 2014-01-21 drums 01 Receipt Create Date 1/21/2014 11:18:05 AM Source: Manual

Receipt No Receipt Date Packing Slip No. Supplier Name Received by

To Be Assigned 1/21/2014 DELL MARKETING LP Cheryl Drum

mm/dd/yyyy

RECEIPT ADDRESS

Location Attn: Melissa Page Dept: Sociology and Anthropology Rm: 102 Riggs Tenements 19 St Philip Street Charleston, SC 29401 United States

CARRIER

Tracking No. Flexible Text Field Flexible Text Field 2 Flexible Drop Down Attachments Notes (1,000 Chars. Max)

DELIVERY

Other

Attach/Link

Receipt Lines

Line Details

Show Receipt Details For Selected Lines: Remove Selected Items Go

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
P0017899	1	01:00 8,000 Page Yellow Toner Cartridge for Dell 5100cn Color Laser Printer	310-5808	2 EA		2		Received	Remove Line Receive & Return
P0017899	2	02:00 9,000 Page Black Toner Cartridge for Dell 5100cn Color Laser Printer	310-5807	3 EA		3		Received	Remove Line Receive & Return
P0017899	3	03:00 120 V Fuser Kit for Dell 5100cn Color Laser Printer	310-8727	2 EA		2		Received	Remove Line Receive & Return

Delete Add PO Save Updates Complete

Please note that an item can also be marked as *Returned* or *Cancelled*, if applicable. When finished, click on the *Complete* button and a screen similar to the one below will appear. This is the final screen in the creating receipts process.



*Do not create a receipt for orders paid with a PCard or received at Central Warehouse.*

## Correcting Receipts

On occasion, it may be necessary to modify a receipt to correct inaccuracies. To make corrections to an existing receipt, first search for, locate and open the Purchase Order using the methods listed in the above section, *Document Search*.

Locate the *Receipts* tab within the purchase order:

Receipt No.	Receipt Date	Receipt Type	Received by
6935113	1/21/2014	Quantity	Branton, Matthew

No	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Qty / Cost (In)	Qty / Cost (Out)	Status
1	HP DAT 160 Data Cartridge 160GB	7740280	31.07 USD	1 EA	31.07 USD	1		Net Received

The "Receipt No.", the date it was created, the type of receipt and finally who received the order will be visible. To modify the receipt, click on the Receipt No. This will open up the receipt.

Click on the *Reopen Receipt* button to make changes.

The screenshot shows the top of the eProcure interface. The header bar includes the user name 'Cheryl Drum', a star icon, 'Action Items', 'Notifications', and a currency display '4,758.66 USD'. Below the header, the breadcrumb trail reads 'Orders & Documents > Document Search > Search Documents > Receipt No. 6935113'. On the right side of the breadcrumb trail, there is a blue button labeled 'Reopen Receipt' and a printer icon. The main content area has tabs for 'Summary', 'Comments (0)', and 'History'. Below the tabs is a section titled 'Header Information' with a question mark icon. It contains fields for 'Receipt Name' (2014-01-21 brantonm 02), 'Receipt Create Date' (1/21/2014 10:02:49 AM), 'Complete Date' (1/21/2014 10:02:52 AM), and 'Source: Manual'. At the bottom of this section is a table with columns: 'Receipt No.', 'Receipt Date', 'Packing Slip No.', 'Supplier Name', and 'Received by'.

eProcure will prompt the user to verify the reopening of the receipt. Answer “Ok”, and supply the reason for modifying the receipt in the comment box, i.e. over received. The receipt reopens for editing, see screenshot below.

The screenshot shows the 'New Qty Receipt' screen. The header bar is identical to the previous screenshot. The breadcrumb trail is 'Orders & Documents > Document Search > Search Documents > New Qty Receipt'. On the right side of the breadcrumb trail, there are four buttons: 'Delete', 'Add PO', 'Save Updates', and 'Complete'. The 'Complete' button is highlighted with a red rectangle. Below the buttons are tabs for 'Summary', 'Comments (0)', and 'History'. The 'Header Information' section contains the same fields as before. Below this is a 'Receipt Address' section with a 'Location' dropdown, a text area for address details, and a 'Carrier' dropdown. To the right of the address is a 'DELIVERY' section with a 'Carrier' dropdown, a 'Tracking No.' field, two 'Flexible Text Field' inputs, a 'Flexible Drop Down' menu, and an 'Attachments' section with an 'Attach/Link' button and a 'Notes' text area. Below the address section is a 'Receipt Lines' section with a 'Line Details' tab. It includes a 'Show Receipt Details' button and a 'For Selected Lines: Remove Selected Items' button with a 'Go' button. A table lists receipt lines with columns: 'PO No.', 'PO Line No.', 'Product Name', 'Catalog No.', 'Qty/UOM ordered', 'Previous Receipts', 'Quantity', 'Add to Inventory', 'Line Status', and 'Actions'. The first line is 'P0017736', '1', 'HP DAT 160 Data Cartridge 160GB', '7740280', '1 EA', '1', 'Received', and has 'Remove Line' and 'Receive & Return' buttons. At the bottom of the screen are the buttons 'Delete', 'Add PO', 'Save Updates', and 'Complete'.

Change the receipt to modify the line items that have already been received, remove line item(s) or delete the receipt altogether by clicking on the *Delete* button on either the top or bottom of the screen.

The *Save Updates* button will save any changes within this screen, but in order for the edits to be submitted, the user must click on the *Complete* button!

# Your Requisition has been Returned

Occasionally, the user will receive an email stating that their requisition has been returned. This could happen for a variety of reasons – incorrect Accounting Codes being the most common reason. The email will describe the problem. Look for a section at the bottom of the email that begins with "The following notes were attached to this requisition during the workflow process."

Subject: FW: Your requisition has been returned. Requisition#: 25xxxx0

-----Original Message-----  
From: eProcureHelp@cofc.edu [mailto:eProcureHelp@cofc.edu]  
Sent: Monday, October 17, 2011 9:06 AM  
To: Stevenson, Phil  
Subject: Your requisition has been returned. Requisition#: 25xxxx0

Re: REQUISITION RETURNED FOR REQUISITION#: 25xxxx0 Cart Name: 2011-10-14 stvensonpj1 01 Prepared by: Phil Stevenson

Dear Phil Stevenson,

This requisition has been returned. To modify the requisition go to "Draft Carts"

\*\*\*\*

If you have any questions with regard to this requisition, please contact the approver who returned the requisition or Procurement.

Support Team Contact Information:  
+1 (843) 953-5510  
eprocurehelp@cofc.edu

Thank you,  
Procurement Office, College of Charleston

The following notes were attached to this requisition during the workflow process:  
The requisition total is under \$10,000 and the Certify Fair has not been set to 'Yes'

The reason that the requisition was returned will be in this section, as well as instructions on how to modify and successfully submit the order.

If an order is returned, the cart is returned to the user's draft shopping carts. The user should open the cart and proceed to the checkout process, correct the error and resubmit the shopping cart.

## New Supplier Request or Change

Occasionally the supplier of the requested good/service may not have done prior business with the College of Charleston. Request a new supplier through eProcure using the *Non-Catalog Form*.

Non-Catalog Form Available Actions: Add and go to Cart Go Close

Supplier Info

Enter Supplier

or  
supplier search

If your purchase is over \$10,000 and you are not using a State-contracted vendor, it will need to be bid out. Please use "NEEDSBID" as your vendor

If your vendor is a new vendor, please:

- Select (by typing) "UNKNOWN" in the Supplier box, and
- Fill out the **New Supplier Request or Change Form** along with the company's **IRS W-9 Form** and attach them to your order in the checkout

General Info

In the *Non-Catalog* Form, there are links (red box in above screenshot) to the required forms. The *New Supplier Request or Change* Form is an Adobe form that allows the user to complete the required information fields, save the document and attach it to the order.

Attach a copy of the company's W-9 (the IRS W-9 form is required by State and Federal law) and the completed *New Supplier Request or Change* Form to the shopping cart during the checkout process (internal attachments). These forms are also available on the Office of Procurement's website.



**Avoid Delays!**

If the completed W-9 and New Supplier Form are not attached to the order, it will stop in Procurement until they are received and processed.

## Placing an Order with the New Supplier

Even if the *New Supplier Request or Change* Form is attached to the order, it is still possible to place the order normally without having to wait for the new vendor to be set-up. To do so select the vendor named, "UNKNOWN", on the Non-Catalog Form. This is a temporary placeholder until the new vendor is set-up in both Banner and eProcure.

From here, fill out the form following normal procedures. Once the Office of Procurement has added the supplier, the order will be modified to show the new supplier and sent on through the approval process to create the requisition and subsequent purchase order.

***Only select the "UNKNOWN" vendor when requesting a new supplier. Selecting this option any other time will cause the order to fail.***

## Showcased Services

The Office of Procurement has added frequently used services to this centralized area on the home/shop page.



Business Card Express and Enterprise Rent-A-Car services contain additional information to place an order. Also included is the link to their website.



Xerox Renewal Form is used yearly to renew the contract for departmental Xerox multi-functional printers. This form is a template that should be used to ensure the proper information is captured and the purchase order can be processed. The College has a combined bill for the entire campus. There will only be one purchase order issued. Submitting this request will simply provide approval for the funds to be spent

Apple OS X Mountain Lion License. Use this pre-populated Non-Catalog Form to order a new license. Simply add it to a shopping cart, complete the check-out process, and place the order.

## **Expenditure Authorization**

This is the electronic version of the form on the Controller's website. Complete all required fields and attach all required documents to this form. This may include, IRS Form W-9, New Supplier Request/Change Form, signed registration form, etc.

When all fields are completed, add this form to an empty shopping cart. Take the shopping cart through the check-out process and place the order. After the necessary approvals have been secured (electronically), the requisition will be sent to the Controller's Office for final processing.

## **PO Change Request**

Occasionally, a purchase order needs to be modified after the purchase order number has been assigned and the sent to the vendor. Use the PO Change Request form to:

- Increase/decrease the purchase order amount
- Add or delete line items
- Cancel the purchase order in its entirety
- Change accounting codes (index/account numbers)

The form can be found on the Home/Shop page under *Showcased Services*.

Complete the required fields (bold), add the form to an empty cart, and take the shopping cart through the check-out process similar to a normal purchase.

Upon electronic receipt of this request, a Procurement Officer will make the necessary changes to the purchase order. eProcure will generate a new requisition number for this shopping cart, but the changes to the purchase order can be found under the revisions tab in the original purchase order. Also, a receipt can only be created for the original purchase order and not for any subsequent changes. The Procurement Officer will request that these changes be "received" in Banner.

See the screenshot on the following page for an example of how the form looks.

**PO Change Request**

Available Actions: Add and go to Cart Go Close

**PO Change Request Instructions** ?

Use this form to request a change to a Purchase Order that has already been sent to the supplier.

In order to ensure proper handling of your request, you must do the following:

- Complete this form by providing as much detail as possible regarding the requested change.
- Enter the new PO Total if the change results in an increase in value. Enter the original PO total if this is a FOAPAL change only.
- Enter the original FOAPAL values or new FOAPAL values in the Accounting Codes section of the shopping cart. If multiple FOAPALS are required, please click "add split" in the shopping cart to include additional FOAPAL strings as required. This will ensure proper approval review routing of this change request.
- Please do not add this form to a shopping cart with an order to another vendor. It must be submitted by itself in its own cart.

This form will be routed through the FOAPAL review process and then to Purchasing for the completion of the change request. Contact the Purchasing Department with any questions.

**Supplier Information** ?

Supplier Procurement Office

**PO Change Request Details** ?

Please complete the fields below to describe the nature of this PO Change Request. Provide as much information as possible on this form to avoid delays in processing. Fields in **bold** are required.

**PO Number**

**Supplier Name**

**Type of Change:** Please select...

Enter the original total and the new total cost of the reference PO (if applicable). If the value of the PO has increased, enter the new total (original value + increase). If the change is to FOAPALS only, enter the original value of the PO. Purchasing will not complete the change unless proper approval has been made for the new PO total.

**Current PO Total: \$**

Increase PO By: \$

Decrease PO By: \$

**New PO Total: \$**

Capital Project ☐

Taxable ☐

Please describe the required PO change as well as justification for the change. Be specific in order to avoid any delays in processing. If there are changes to one or more lines on the PO, please include the line number and associated change for each.

PO Change Request Details

2000 characters remaining expand | clear

# Helpful Tips and Tricks

## Copying Orders

It is possible to duplicate a previously placed order. This can be a real time saver! First find the requisition. Click on the *Orders & Documents* menu in the navigation bar and select *Search Documents* from the list. Enter the requisition number in the search field and click *Go*. If the requisition number is unavailable, search for the purchase order and open it. The requisition number is hyper-linked on the first tab of the purchase order.

From the *Requisition* tab within the requisition is an "Available Actions" drop-down menu (right side of the screen).

Available Actions: Add Comment Go

- Add Comment
- Add Notes to History
- Copy to New Cart

Choose "Copy to New Cart" from this menu and click on the *Go* button. Everything in that requisition will be copied to a new shopping cart (including any attachments) and placed into the user's Draft Carts.

**Be sure to make any necessary changes to the new cart before submitting it for order!**

## Purchase Requisition (PR) Approvals Tab

Within a requisition there is a *PR Approvals* tab.

This screenshot shows the 'PR Approvals' tab for requisition 46758847. The interface includes a top navigation bar with 'Orders & Documents', 'Document Search', and 'Search Documents'. A warning message states: 'You are reviewing a requisition currently assigned to the approver Eric Clark'. Below this, the 'PR Approvals' tab is highlighted with a red box. The 'Available Actions' dropdown shows 'Approve/Complete & Show Next' and a 'Go' button. The main content area displays a workflow diagram with four steps: 'Banner Budget Authorization' (Completed), 'Fund Approval' (Approved), 'Procurement Review' (Active), and 'Create PO' (Future). The 'Procurement Review' step is currently active, showing 'Eric Clark' as the approver. A 'Finish' button is visible at the end of the workflow.

Click on the tab for a visual illustration of where a requisition is in the approval process (see above screenshot). In the above example, the fund expenditure for this requisition was approved and it is currently awaiting the next approval step (Procurement Review).

Alternately, view a historical accounting of the life of the requisition by clicking on the *History* sub-tab.

This screenshot shows the 'History' sub-tab for requisition 46758847. The 'History' sub-tab is highlighted with a red box. The 'Available Actions' dropdown shows 'Approve/Complete & Show Next' and a 'Go' button. The main content area displays a table of requisition history records. The table has columns for Line No, Date/Time, User, Step(s), Action, Field Name, From, To, and Note. There are 15 records found, and the first four are visible in the screenshot.

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
1	1/21/2014 2:53 PM	Michael Turner		Requisition forwarded		Michael Turner	Eric Clark	Eric, please review and process. Thanks
2	1/21/2014 2:53 PM	Michael Turner	Procurement Review	Requisition assigned				
3	1/21/2014 1:29 PM	Jeremy Clement	Fund Approval	Requisition step auto approved				
4	1/21/2014 1:29 PM	System	Banner Budget Authorization	Requisition approved				

# eProcure Cheat Sheets

## Commodity Families

Apparel/Luggage/Personal Care Products	53xxxxxx
Building/Construction Machinery & Accessories	22xxxxxx
Building/Construction Maintenance Services	72xxxxxx
Chemicals including Bio-Chemicals & Gas Materials	12xxxxxx
Cleaning Equipment & Supplies	47xxxxxx
Commercial/Military/Private Vehicles & Accessories/Components	25xxxxxx
Communications/Computer Equipment/Peripherals, Components & Supplies	43xxxxxx
Defense/Law Enforcement/Security/Safety Equipment & Supplies	46xxxxxx
Distribution/Conditioning Systems Equipment & Components	40xxxxxx
Domestic Appliances/Consumer Electronic Products & Supplies	52xxxxxx
Drugs/Pharmaceutical Products	51xxxxxx
Editorial/Design/Graphic & Fine Art Services	82xxxxxx
Education/Training Services	86xxxxxx
Electronic Components & Supplies	32xxxxxx
Engineering/Research/Technology Based Services	81xxxxxx
Environmental Services	77xxxxxx
Farming/Fishing/Forestry/Wildlife Contracting Services	70xxxxxx
Farming/Fishing/Forestry/Wildlife Machinery & Accessories	21xxxxxx
Financial/Insurance Services	84xxxxxx
Food/Beverage/Tobacco Products	50xxxxxx
Fuels/Fuel Additives/Lubricants & Anti-Corrosive Materials	15xxxxxx
Furniture & Furnishings	56xxxxxx
Healthcare Services	85xxxxxx
Industrial Cleaning Services	76xxxxxx
Industrial Manufacturing & Processing Machinery & Accessories	23xxxxxx
Industrial Production & Manufacturing Services	73xxxxxx
Laboratory/Measuring/Observing/Testing Equipment	41xxxxxx
Lighting/Electrical Accessories & Supplies	39xxxxxx
Live Plant & Animal Material & Accessories and Supplies	10xxxxxx
Management/Business Professionals/Administrative Services	80xxxxxx
Manufacturing Components & Supplies	31xxxxxx
Material Handling/Conditioning/Storage Machinery Accessories & Supplies	24xxxxxx
Medical Equipment, Accessories & Supplies	42xxxxxx
Mineral/Textile/Inedible Plant/Animal Materials	11xxxxxx
Mining Machinery & Accessories	20xxxxxx
Mining/Oil/Gas Drilling Services	71xxxxxx
Musical Instruments/Games/Toys/Arts & Crafts/Educ. Equip, Accessories & Supplies	60xxxxxx

National Defense/Public Order/Security & Safety Services	92xxxxxx
Office Equipment, Accessories & Supplies	44xxxxxx
Organizations/Clubs	94xxxxxx
Paper Materials & Products	14xxxxxx
Personal/Domestic Services	91xxxxxx
Politics/Civic Affairs Services	93xxxxxx
Power Generation/Distribution Machinery & Accessories	26xxxxxx
Printing/Photographic/Audio Visual Equipment & Supplies	45xxxxxx
Public Utilities/Public Sector Related Services	83xxxxxx
Published Products	55xxxxxx
Resin/Rosin/Rubber/Foam/Film/Elastomeric Materials	13xxxxxx
Service Industry Machinery Equipment & Supplies	48xxxxxx
Sports/Recreational Equipment, Accessories & Supplies	49xxxxxx
Structures/Building/Construction Components & Supplies	30xxxxxx
Timepieces/Jewelry/Gemstone Products	54xxxxxx
Tools/General Machinery	27xxxxxx
Transportation/Storage/Mail Services	78xxxxxx
Travel/Food/Lodging/Entertainment Services	90xxxxxx

## Commodity Codes\*

\*This is not a comprehensive list of all account codes but contains the most commonly used.

Air Conditioning Install/Maintenance/Repair Services	72102305
Audio Visual Equipment	52161500
Chartered Bus Services	78111803
Civil Engineering	81101500
Computers	43211500
Credenzas	56101701
Desks	56101703
Electrical Engineering	81101700
Handyman Services	72101501
Hosted Services	81112106
IT Services	81160000
Lab Ovens	41104500
Laboratory and Scientific Equipment	41100000
Mail & Cargo Transport	78000000
Mechanical Engineering	81101600
Professional Engineering Services	81100000
Rats	10101505
Software	43230000
Software Maintenance & Support	81112200
Task Seating	56112102

## Account Codes\*

\*This is not a comprehensive list of all account codes but contains the most commonly used.

### Services:

Advertising	710815
Auditing & Acct Services	710510
Bank Service Charge	710812
Building Renovation	710211
Cellular & Paging Service	710412
Data Processing Service	710414
Education And Training	710514
Engineering & Architecture	710511
Freight, Express, Del	710816
General Repair	710213
Guest Package Charges	710818
Honorariums-Non-Us Resident	710517
Honorariums Us Resident	710516
Household ,Laundry, Jan, Sec	710210
HVAC Maintenance	710214
In Service Training State	710518
In Service Training-Non-State	710518
Legal	710512
Medical And Health	710813
Motorized Vehicle Services	710814
New Construct/Renovation	710212
Other Construction Service	710810
Office Equip Service	710811
Other Telephone Service	710411
Out Of State Registration	710519
Print Binding Library	710111
Printing-Binding	710110
Printing-Communication Vendor	710110
Procure Cd Service	710817
Storm Water Utility Fee	710311
Telephone And Telegraph	710410
Telephone/Internet	710413
Temp Service Commission	710513
Utilities	710310

### Supplies:

Clothing	720185
Const. & Renovation Supplies	720121
Data Processing-Supplies	720130
Educational Supplies	720187
Food Supplies	720184
Fuel Supplies	720124
Jan Supplies-General	720120
Library Books	720170
Library Journals	720170
Maintenance Supplies	720122
Medical Supplies	720182
Motor Vehicle Supplies	720123
Non-Cap Off/Ed Equip	720181
Non-Capital Comp Equip	720130
Non-Capital Other Equip	720186
Non-Capital Software	720131
Office Supplies	720140
Other Supplies	720186
Participant Supplies	720150
Photographic Supplies	720160
Postage	720183
Printing-In House	720110
Procure Cd Supplies	720180
Xerox Copies	720111

**Fixed Charges:**

Contributions	740311
Dues And Memberships	740310
Insurance-State Purchase	740410
Other Fixed Charges	740316
Pres Choice Awards	740225
Ren-Data Proc Equip	740111
Rental Other	740116
Rental-Non St Prop	740112
Rental-Office Equip	740110
Rental-State Prop	740113
Royalties	740313
Stipend - Federal	740224
Stipends	740222

**Equipment over \$5000:**

Computer Equipment	770110
Library Books	770116
Motor Vehicle Purchase	770113
Off/Ed Equipment	770112
Offsite Equipment	770111
Other Equipment	770115
Software Pack Purchase	770114

**Capital Project Codes** (Used Only With Capital Projects, 77xxxx)

Architecture Service	780210	Masonry	780514
Builder's Risk Insurance	780213	Millwork	780519
Cap Procure Cd Supply	780311	Mobilization	780610
Carpet	780524	Non-Cap Equip Other	780313
Concrete	780512	Plumbing	780526
Concrete Sidewalks	780513	Purchase Of Building	780111
Construction	780510	Purchase Of Land	780110
Cost Of Building Construction	780510	Renovation	780528
Doors	780520	Repair And Replace	780528
Electrical Systems	780529	Roofing	780522
Elevators/Escalators	780527	Rough Carpentry	780517
Finish Carpentry	780518	Site	780410
Finishes	780521	Site Work	780410
Fire Sprinkler System	780531	Special Construction	780525
Fixed Furniture-Cap	780310	Specialties	780523
Grading-Demolition	780411	Structural Steel	780515
HVAC	780516	Survey & Testing	780211
Ins & Surety Bond Cost	790120	Tangible Equipment	780312
Interior Decoration	780511		
Legal Fees	780212		
Lighting	780530		